

## POSITION STATEMENT

1. POSITION INFORMATION	
CIVIL SERVICE CLASSIFICATION:	WORKING TITLE:
Senior Tax Compliance Representative	<i>Project Coordinator/Department of Labor Analyst</i>
NAME OF INCUMBENT:	POSITION NUMBER:
<i>Click here to enter text.</i>	280-620-8687-xxx
OFFICE/SECTION/UNIT:	SUPERVISOR'S NAME:
Taxpayer Advocate Bureau Management Analysis and Project Section Project Management Group	Yang Vang
DIVISION:	SUPERVISOR'S CLASSIFICATION:
Tax Support	Tax Administrator I, EDD
BRANCH:	REVISION DATE:
Tax	2/11/2022
<b>Duties Based on:</b> <input checked="" type="checkbox"/> FT <input type="checkbox"/> PT– Fraction _____ <input type="checkbox"/> INT <input type="checkbox"/> Temporary – _____ hours	
2. REQUIREMENTS OF POSITION	
<b>Check all that apply:</b> <div style="display: flex; justify-content: space-between;"> <div> <input checked="" type="checkbox"/> Conflict of Interest Filing (Form 700) Required  <input type="checkbox"/> May be Required to Work in Multiple Locations  <input type="checkbox"/> Requires DMV Pull Notice  <input type="checkbox"/> Travel May be Required         </div> <div> <input type="checkbox"/> Call Center/Counter Environment  <input checked="" type="checkbox"/> Requires Fingerprinting &amp; Background Check  <input type="checkbox"/> Bilingual Fluency (<i>specify below in Description</i>)  <input type="checkbox"/> Other (<i>specify below in Description</i>)         </div> </div>	
<b>Description of Position Requirements:</b> (e.g., qualified Veteran, Class C driver's license, bilingual, frequent travel, graveyard/swing shift, etc.) <i>Click here to enter text.</i>	
3. DUTIES AND RESPONSIBILITIES OF POSITION	
<b>Summary Statement:</b> (Briefly describe the position's organizational setting and major functions)	
<p>Under the general supervision of the Tax Administrator I, the Senior Tax Compliance Representative (STCR) performs at an advanced journey person level as a team member and Subject Matter Expert (SME) in the Project Management Group (PMG), within the Management Analysis and Project Section. PMG performs work of a highly complex nature, which requires a high level of technical expertise and Tax Branch program knowledge. PMG's responsibilities include providing support to the development, analysis, and monitoring of the Branch strategic plan and performance measurements, coordinating Branch level projects, conducting the Department of Labor (DOL) - Unemployment Insurance Data Validation (UIDV) program and Tax Performance System (TPS) reviews and providing the required tax reports to the DOL.</p> <p>The STCR independently performs the most complex, difficult, and sensitive assignments, using a high degree of judgment, knowledge, and technical expertise. The STCR is responsible for a variety of duties; including taking a lead role on Tax Branch Projects, serving as a project coordinator or Branch representative, and conducting the DOL-UIDV/TPS program reviews. In addition, the STCR performs work related to compliance with the California Unemployment Insurance Code and Tax Branch's audit, collection,</p>	

and accounting programs. The STCR must possess knowledge of the operations of the Branch and knowledge of strategic planning methods, performance measuring and benchmarking, and knowledge of statistical methods and analysis. The STCR will interact with all levels of management, including the Branch Executive Team (BET) and the Branch Senior Management Team (SMT).

The STCR is responsible for independently providing analytical support and a high level of technical expertise for the following categories and activities:

Percentage of Duties	Essential Functions
40%	<p>Tax Branch Strategic Plan - Provide support for the Strategic Planning process</p> <ul style="list-style-type: none"> <li>• Develop meeting agendas, coordinate and facilitate Strategic Planning meetings</li> <li>• Maintain and update the Tax Branch Strategic Plan, the Tax Branch Balance Scorecard, the Tax Branch Strategic Measures Dashboard, and the SharePoint website</li> <li>• Coordinate and collect the quarterly information for the Tax Branch Strategic Measures</li> <li>• Track, analyze, and assess the Branch's performance measurements to determine if the Branch is moving toward its strategic goals</li> <li>• Coordinate and summarize the Project Status Reports for the Branch Strategic Initiatives</li> </ul>
35%	<p>DOL-UIDV Program Reviews and Reports – Prepare and analyze DOL-UIDV information</p> <ul style="list-style-type: none"> <li>• Prepare the annual DOL Detailed Workplan</li> <li>• Prepare the DOL Annual Report</li> <li>• Conduct the UIDV program reviews and transmit the completed results to DOL</li> <li>• Write and maintain procedures for the DOL program reviews</li> <li>• Examine and analyze the DOL Computed Measures to identify trends in the timeliness and completeness of Tax Branch's audit, collection, and accounting programs</li> <li>• Draw conclusions from the DOL Computed Measures, Systems Reviews and Acceptance Sample Reviews, and prepare recommendations for system or process improvements</li> <li>• Coordinate with the Tax Branch to prepare the Tax Branch portion of the State Quality Service Plan, including the preparation of Corrective Action Plans</li> </ul>
10%	<p>Project Work - Lead on critical projects</p> <ul style="list-style-type: none"> <li>• Facilitate meetings with project team and ensures all critical project deadlines are met</li> <li>• Projects based on new legislation, process improvements, system changes, etc.</li> <li>• Projects may have short timeframes for completion, Branch-wide impact, or may impact external customers</li> <li>• Prepare project charters and Branch-wide or Departmental project work plans</li> <li>• Provide updates to the BET and/or SMT through e-mails and/or presentations</li> <li>• Meet, discuss, and coordinate State Leadership Accountability Act (SLAA) responses for the Branch</li> <li>• Facilitate Business Process Improvement with TSD Stakeholder</li> <li>• Facilitate and store Tax Branch Policies on Tax Branch SharePoint site</li> </ul>
10%	<p>Tax Branch SMT Meetings - Coordinate the SMT meetings</p> <ul style="list-style-type: none"> <li>• Reserve quarterly meeting dates for SMT meetings - schedule location and room</li> <li>• Plan meetings, develop meeting agenda, secure guest speakers, and develop exercises to meet Branch goals and objectives</li> <li>• Meet with BET members to review and approve the SMT meeting agenda</li> <li>• Assist with the facilitation of the SMT meetings</li> </ul>
Percentage of Duties	Marginal Functions
5%	Performs other duties as assigned.

**Civil Service Classification**  
Senior Tax Compliance Representative

**Position Number**  
280-620-8687-xxx

**4. WORK ENVIRONMENT** *(Choose all that apply)*

Standing: Occasionally - activity occurs < 33%	Sitting: Continuously - activity occurs > 66%
Walking: Occasionally - activity occurs < 33%	Temperature: Temperature Controlled Office Environment
Lighting: Artificial Lighting	Pushing/Pulling: Occasionally - activity occurs < 33%
Lifting: Occasionally - activity occurs < 33%	Bending/Stooping: Occasionally - activity occurs < 33%
Other: <i>Click here to enter text.</i>	

**Type of Environment:**

☐ High Rise   ☒ Cubicle   ☐ Warehouse   ☐ Outdoors   ☐ Other:

**Interaction with Customers:**

☐ Required to work in the lobby   ☐ Required to work at a public counter  
☒ Required to assist customers on the phone   ☒ Required to assist customers in person  
☐ Other:

**5. SUPERVISION EXERCISED:**

*(List total per each classification of staff)*

None; may act as a lead.

**6. SIGNATURES**

**Employee's Statement:**

*I have reviewed and discussed the duties and responsibilities of this position with my supervisor and have received a copy of the Position Statement.*

Employee's Name: *Click here to enter text.*

Employee's Signature:

Date:

**Supervisor's Statement:**

*I have reviewed the duties and responsibilities of this position and have provided a copy of the Position Statement to the employee.*

Supervisor's Name: *Click here to enter text.*

Supervisor's Signature:

Date:

**7. HRSD USE ONLY**

**Personnel Management Group (PMG) Approval**

<input checked="" type="checkbox"/> Duties meet class specification and allocation guidelines.	PMG Analyst Initials	Date Approved
<input type="checkbox"/> Exceptional allocation, STD-625 on file.	JL	3/25/2020

**Reasonable Accommodation Unit use ONLY** *(completed after appointment, if needed)*

*If a Reasonable Accommodation is necessary, please complete a Request for Reasonable Accommodation (DE 8421) form and submit to Human Resource Services Division (HRSD), Reasonable Accommodation Coordinator.*

List any Reasonable Accommodations made:

*Click here to enter text.*

**Supervisor:** After signatures are obtained, make 2 copies:

**Civil Service Classification**

Senior Tax Compliance Representative

**Position Number**

280-620-8687-xxx

- Send a copy to HRSD (via your Attendance Clerk) to file in the employee's Official Personnel File (OPF)
- Provide a copy to the employee
- File original in the supervisor's drop file